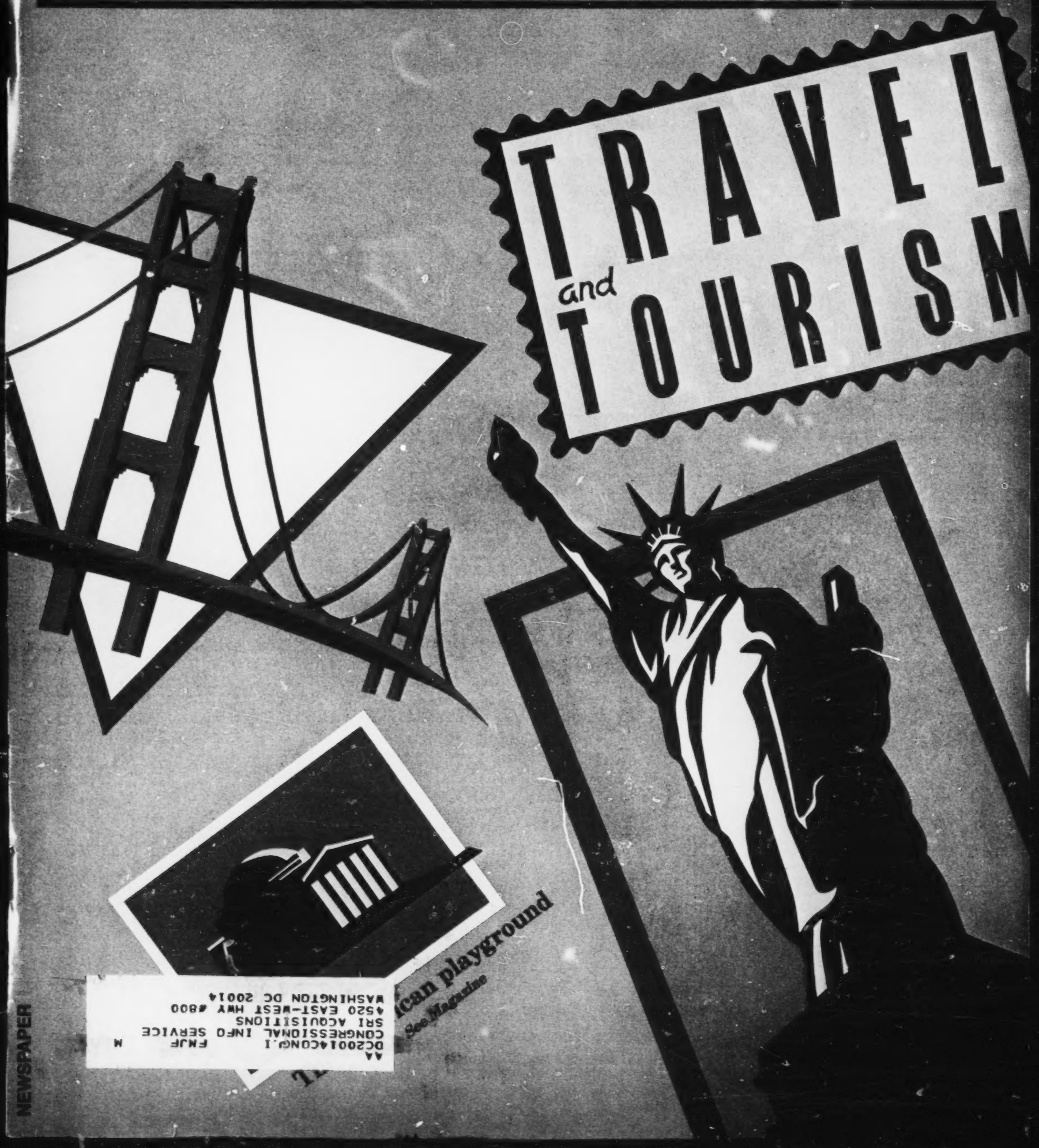
C2710-1

Advertising Age

© Entire contents copyright 1982 by Crain Communications Inc. All rights reserved.

$1 a copy; $40 a year | The International Newspaper of Marketing • In Two Sections, Section 1. | April 12, 1982



AA
DC20014CONG.I FMJF M
CONGRESSIONAL INFO SERVICE
SRI ACQUISITIONS
4520 EAST-WEST HWY #800
WASHINGTON DC 20014

In dual buy with TRIM

Tele-Research to Harte-Hanks

SAN ANTONIO—Harte-Hanks Communications, a communications conglomerate with annual revenues exceeding $355,000,000, continued its expansion into the research industry via the acquisition of TRIM Inc. and Tele-Research Inc., both based in Los Angeles.

The acquisition of TRIM, a research company that pioneered Universal Product Code scanner checkout measures of grocery products movement, was expected (AA, March 15), but the acquisition of Tele-Research, founded in 1964 and one of the largest research companies specializing in tv copy testing, was not.

Both acquisitions will become part of the Marketing Service Group of HHC, which already includes Urban Data Processing, Burlington, Mass., acquired in 1978, and RMH Research Inc., Fair Lawn, N.J., which was started by HHC as an entrepreneurial venture in 1975.

■ These two units had revenues estimated at $8,000,000 in 1981, and the TRIM/Tele-Research combo had revenues estimated at about $3,750,000. Put together, they will make HHC one of the top 20 research organizations in the country.

HHC, whose operations are concentrated in the southwestern states, owns 99 newspapers, four tv stations, 11 radio stations and one cable tv operation. The head man, as far as acquisitions are concerned, is Larry Franklin, a senior vp.

Both TRIM and Tele-Research were founded by Ward J. Jenssen. Because of an exclusive arrangement with Ralphs Grocery Co. in Los Angeles, the operation that became TRIM (for Tele-Research Item Movement), was on the ground floor in utilizing UPC scanner-derived data for controlled stores tests, a development often eulogized by Patrick W. Collins, president of Ralphs.

In March, 1978, HHC announced an "association" with TRIM, which had been spun off as a company separate from Tele-Research, and TRIM started to use an HHC com-

(Continued on Page 88)

A 'Times' coverup?

The New York Times Magazine absolutely refused to let a Michelangelo nude appear au natural in a Charles Jourdan shoe ad for the spring fashion section. A retouching artist was called in to dress the figure in shorts. Here is the first ad in the series in its original form. Ketchum Communications handles.

Murdoch's move perils 'News'

By STUART EMMRICH

NEW YORK—The chances that the *New York Daily News* might fold increased dramatically last week as the three principals involved in talks to find a buyer for the paper —the Tribune Co., the paper's unions and prospective buyer Joe Allbritton—each pulled a bargaining ploy that combined to jeopardize the possibility of reaching agreement.

The Tribune Co. made the first move Wednesday, designating Mr. Allbritton as the "buyer of last resort" and telling the unions that it would close the paper unless they met the contract terms Mr. Allbritton says are necessary for him to take over the paper. Those terms involve staffing and contract concessions—including a cut of 1,600 jobs—that Mr. Allbritton said would save the money-losing paper $85,000,000 a year. He also insisted that April 25 was the final deadline for agreement to be reached.

The unions countered with their own bombshell Thursday. They asked *New York Post* owner Rupert Murdoch to consider making his own offer for the *Daily News*. He said he would study the matter during the weekend and scheduled an April 12 meeting with the unions.

■ With that, Joe Allbritton announced on Thursday night that he had broken off talks with the unions. The Texas financier said he would not resume bargaining unless the unions acknowledge that he is the only possible buyer for the *News* and they retract their overture to Mr. Murdoch. "I am the only possible purchaser of the *News*," Mr. Allbritton said. In a statement that further chilled prospects for the paper's survival, he added, "I am therefore suspending further meetings with the unions until their position is clarified."

Mr. Allbritton also repeated his April 25 deadline.

Union officials refused to comment on Mr. Allbritton's demands that they not bring Mr. Murdoch into the negotiation process and indicated that this morning's meeting would go on as planned. Earlier in the week, Mr. Murdoch projected himself into the picture by announcing that he would expect to gain the same concessions the unions agree to make to the *News*.

Some industry observers said they thought the unions made a tactical error by turning to Mr. Murdoch at this time and feared the move might very well backfire.

"This was not a smart move for them," said Bruce Thorp, a newspaper industry analyst at Lynch, Jones & Ryan. "I can't imagine Murdoch, if he controlled both papers, keeping them both running, and certainly not with the number of total jobs that are now involved. I'm not sure if I know what the unions could gain from this.

Mr. Thorp added that the unions were also risking the possibility that Mr. Murdoch could string out the talks with the unions beyond the April 25 deadline, watch Mr. Allbritton walk away from the *News*, and have the *Post* reap whatever benefits are to be derived from the demise of its chief competitor.

The unions said Thursday that they asked Mr. Murdoch to consider his own bid for the *Daily News* because they are now fearful that saving the *News* on Mr. Allbritton's terms would ultimately mean the closing of the *Post* and the loss of that paper's 1,200 jobs.

"This may be the only way to keep New York a three-newspaper town," said labor mediator Ted Kheel, an adviser to the paper's 11 unions. "We are not dealing with one ailing newspaper, but two."

Mr. Kheel and other labor officials say they are worried that Mr. Murdoch is serious about closing down the *Post* if the *News* is saved.

George McDonald, head of the Allied Printing Trades Council, an

(Continued on Page 94)

highlights

Monday, April 12, 1982

Patricia Bailey of the Federal Trade Commission responds to a recent article by FTC chairman James C. Miller III. *See Page 10.*

Procter & Gamble is introducing its first paper product to the foodservice industry with a pilot test of Choice towels. *See Page 24.*

A Hong Kong tv station has made a pact that could force foreign advertisers to use its agency if they want to air spots on China's national radio. *See Page 27.*

BBDO; Foote, Cone & Belding, and Ogilvy & Mather top the stock list of publicly held agencies, according to one brokerage house. *See Page 28.*

Eastman Kodak will market a new Ektaprint xerographic copier that could rattle Xerox. *See Page 37.*

Giving up tennis, Avon is taking up women's running and bowling. *See Page 41.*

General Tire & Rubber Co. will appeal to patriots in its spring effort for its new Ameri tire line. *See Page 45.*

An ad exec is brushing up on product development by getting involved in creating a new household dental appliance. *See Page 46.*

Conde Nast is almost finished hiring its ad sales staff for *Vanity Fair*. *See Page 47.*

CBS Inc. and 20th Century-Fox Film Corp. are working out details for their new video partnership. *See Page 49.*

Approaching its second birthday, Silhouette Books is growing quickly. *See Page 60.*

Daytime is bubbling with schedule changes, as ABC's soap rivals try to close the ratings gap. *See Page 72.*

Soap opera formats are starting to clean up on prime time, thanks to an initial boost from "Dallas." *See Page 72.*

Demand for original movies for prime time syndication is growing. *See Page 83.*

CORPORATE CLOSEUP

Jaguar pays the price to turn its U.S. operations around and, with major manufacturing changes in place, is pouring new ad dollars into a quality-themed campaign. *See Page 4.*

INTERNATIONAL

A Parisian beauty chain is jumping into a franchising program and aims to have 250 outlets by year's end. *See Page 76.*

VIDEOTECH

More people find television to be in good taste than feel it is poor, according to a new study by Warwick, Welsh & Miller. *See Page 48.*

USA Cable Network is planning to phase out is 11¢-per-subscriber fee. *See Page 53.*

Houston homeowners have been ordered to remove their pirate microwave antennas and decoders or subscribe to the tv service they're intercepting. *See Page 53.*

MAGAZINE

Jeans makers still see Europe as a great market for growth, despite only a modest increase in sales recently, and the five big apparel marketers, including three U.S.-based companies, are stepping up their advertising and promotional efforts. *See Page M-2.*

She has been called "Britain's Phyllis Schlafly," but Mary Whitehouse has retained a sense of humor amid her stern mission of "cleaning up" tv in the U.K. *See Page M-33.*

SPECIAL REPORT

American travelers increasingly are "looking homeward" toward U.S. destinations. The accent on domestic vacations is the theme of this week's Section 2/Special Report on Travel and Tourism. *See Page M-9.*

REGULAR FEATURES

ACCOUNT CHANGES	74
ADBEAT	66
ADVERTISER PEOPLE	70
ADVERTISING MARKETPLACE	79
AGENCY PEOPLE	30
CON-SID-ERATIONS	18
CORRECTIONS & CLARIFICATIONS	6
EDITORIAL VIEWPOINT	16
FOR THE RECORD	87
GETTING PERSONAL	14
MEDIAMOVES	64
MEDIA PEOPLE	32
OBITUARIES	62, 91
PHOTO REVIEW	20
PRESSTIME	8
REGIONAL NEWS	54
SIDEBARS	59
VIDEOTECH UPDATE	52
VOICE OF THE ADVERTISER	78
WEST COAST UPDATE	44
WORLD NEWS ROUNDUP	3

FIGURES TO FILE

AD PAGES IN FARM PUBLICATIONS FOR 3 MONTHS—1981-1982	72
COFFEE MARKET SHARES AND U.S. PER CAPITA COFFEE CONSUMPTION	62

Vol. 53, No. 16—ADVERTISING AGE (ISSN 0001-8899) is published weekly except semi-weekly the fourth week in March, the second week in September at 740 Rush Street, Chicago, IL 60611. Second-class postage paid at Chicago and additional mailing offices.

Ad groups, FTC still negotiating

WASHINGTON—Advertising industry associations were searching last week for ways to indicate some degree of support for Federal Trade Commission chairman James Miller's plan to narrow the commission's powers over deceptive advertising.

A tentative decision reportedly was made to go at least part way on the deception issue, but by the end of last week there was no agreement on details, and some of those who are involved in the negotia-

FTC commissioner Patricia Bailey responds to chairman James Miller's proposals. See Page 10.

tions indicated that "endless meetings" had not yet produced a common position.

The ad industry groups—American Assn. of Advertising Agencies, American Advertising Federation and Assn. of National Advertisers —are tentatively scheduled to state their position on FTC legislation April 20, when a House commerce subcommittee on commerce, transportation and tourism under Rep. James J. Florio (D., N.J.) resumes its hearings on legislation authorizing the FTC to remain in opera-

(Continued on Page 87)

Jeans stretch across Europe

But the right advertising approach creates a dilemma

By Anika Michalowska

Jeans makers who once looked on Europe as El Dorado are in a dilemma. Though jeans have bucked the downtrend hitting most sections of the fashion industry, European unit sales of jeans rose by only 4% to 6% last year—disappointing by spectacular pre-1980 standards. The five big international manufacturers have been repositioning themselves, with enhanced advertising budgets and revamped product lines, to safeguard their market shares against the challenge from unbranded makers and national brands (Brutus in the United Kingdom, Mustang in Germany and Jesus and Rifle in Italy, for example).

The average European buys only one pair a year, against the American's 2.5 pairs. That suggests there is still plenty of room for growth.

But the question they have not resolved is whether, in their advertising, they should go for a pan-European image or a national approach. The issue is both vital and complex. Earlier successes have firmly established jeans as ageless (though the 15 to 35-year-old group is still the main buyer), sexless (about half of European purchases are by women) and classless. The average European—if there is one—buys only one pair a year, against the American's 2.5 pairs. That suggests there is still plenty of room for growth, yet the European average hides wide national discrepancies.

In Sweden, annual sales work out to 1.6 pairs per person, and most other northern nations run close to that.

In Spain, on the other hand, the equivalent figure is 0.6 pairs, and most of the Mediterranean countries have not really come to grips yet with the jeans phenomenon.

So should the advertising approach be rifle shot or scatter gun? The big five—Levi Strauss, Blue Bell/Wrangler and V.F. Corp.'s Lee, all from the U.S., plus Lee Cooper from the United Kingdom and Spain's Lois—have turned the question over recently. Their conclusions are mixed.

Photo by Abramson-Culbert

Most interesting is Lois, which went to the brink of a pan-European strategy and then decided to stick with its national campaigns after lengthy consultations with Young & Rubicam. "I strongly opposed the change," says Jean-Pierre Emden, managing director of Lois France. "I felt we would lose all the investment made over the last few years in our specific advertising." Mr. Emden came out on the winning side. Eventually Lois decided it was "too premature," but it may return to the question "in a few years time."

Levi Strauss & Co., generally accepted as the over-all brand leader—although meaningful data on market shares is in short supply and closely guarded—has no doubts and has practiced a more or less pan-European approach for years. The only division it makes, that for reasons national per-head figures show plainly, is between the U.K. and Scandinavia (coordinated from London) on one hand, and Continental Europe (coordinated from Brussels) on the other. "We have the same strategy as Coca-Cola, with a bit more flexibility in local approaches since we deal with fashion," says Ed Gibson, director of marketing services at Levi's Continental Europe division.

"We have the same strategy as Coca-Cola, with a bit more flexibility in local approaches since we deal with fashion."

Wrangler is currently at a half-way point. Its brand image hit trouble recently—"It became cloudy," the company says—and it is running an image study as a possible prelude to a simultaneous campaign in all European countries. Sales have been dented by the recession, and European marketing services have been restructured into three divisions—north (the U.K., Ireland and Scandinavia), central (Germany and Austria) and south. Each has its own president and is "fairly independent" in terms

Anika Michalowska is a Paris-based stringer for Advertising Age *and* Advertising Age's Focus. *This article is reprinted from the April, 1982, issue of* Focus.

Jeans makers count on arresting ads to help increase sales.

of its advertising approach.

"Our strategy is not to have a pan-European advertising campaign," says Iain G. Lyon, newly appointed president of the southern division. "By doing so, there is a danger of losing specific appeal. The result may be an unexciting compromise. A lot depends also on whether you have a uniform image and a uniform line of products."

Britain's Lee Cooper operates what it calls an informal international policy. Each country retains its autonomy, except for the use of the logo, but all artwork is recorded in a databank, and all national offshoots must consult the group before launching a new campaign. (Lee Cooper's logo has caused problems of late. After two unsuccessful attempts at a revamp, the group called in designers Conran Associates for a third version, now being promoted heavily throughout Europe.)

Lee Cooper France was the first subsidiary to set up its own marketing and advertising structure, and, says ad manager Philippe Forcioli-Conti, it still acts as something of a clearing house for campaigns for other western European countries.

Whether the campaigns are national or pan-national, all five of the major jean brands are set to step up ad spending spectacularly this year.

Exact figures are hard to come by, but in France, for example, Lee Cooper has increased its 1981 ad and promotion budget by 25%, taking it to around $2,500,000 for 1982.

Lois will spend the same, a jump of 50%.

Lee France says for the first time it has opened a "real communications budget."

In two years, Levi increased its allocation by 150%.

All forms of media are being used, but Levi's Ed Gibson, for one, can't wait for new ones, particularly satellite television, to arrive.

An ex-Procter & Gamble and Coca-Cola executive, he believes jeans are one of the most difficult lines to advertise: "We all compete for the same target group [the 19 to 24 age bracket]. We are all promoting me-too products . . . all claiming all the references to authenticity and life style."

Partly for that reason, and to help carve a slice out of the unbranded market, (which accounts for 60% to 65% of sales in France, for example), most of the major brands have been diversifying their product lines.

Jeans themselves have become more complex. In 1977, Levi Strauss satisfied 90% of its customers with just two patterns; now it has around 20. LS Continental Europe vp and general manager of LS France, Andre Kolasinski, told *Depeche Mode* magazine recently that the jeans market is entering a phase of "much narrower segmentation.

Four of the big five have been spreading their wings not only with wider jeans ranges, but with related products—skirts, shirts, parkas, pullovers, sweaters and even shoes.

"Our strategy is not to have a pan-European advertising campaign. By doing so, there is a danger of losing specific appeal . . . . A lot depends also on whether you have a uniform image and a uniform line of products."

The exception is Lee Cooper, which has cut its range back to basic denim. On the face of it, there is logic behind that decision. Between 80% and 85% of the big five's European jeans market is accounted for by the traditional five-pocket, plain denim styles, cut more tightly or less, according to taste. Most of the growth over the past couple of years has come in that area, while interest in corduroy and other fabrics has fallen off.

That, say some experts, signals a return to basics, which fits in well with a time of general austerity.

Others believe firmly in the adage that if the market slows, go out and create a new segment.

Time will show who is right, but if the big five do not recapture the momentum of the years before 1980, it will not be for want of time, thought and promotion effort. AA

The European market for jeans 1980

	Volume (Millions)	Value ($ Millions)
Austria	7.1	126
Belgium-Lux	6.4	150
Denmark	5.0	170
Finland	6.7	160
France	47.5	1,020
Germany	36.8	820
Italy	45.6	1,080
Netherlands	16.6	400
Spain	21.2	340
Sweden	13.3	400
Switzerland	5.0	130
U.K.	51.6	1,080
Total	266.8	6,116

(Source: Euromonitor)

Jeans bought per head of population

(Annual)

	All Groups	Adults Men	Adults Women	Age -15	Age 15-24	Age 25+
Austria	0.5	0.6	0.3	1.1	1.2	0.3
Denmark	1.3	0.9	0.9	2.9	2.1	0.3
France	0.9	0.8	0.5	1.4	1.5	0.4
Germany	1.2	1.0	0.8	2.5	2.0	0.6
Holland	1.3	1.1	0.9	2.5	2.5	0.6
Italy	1.0	0.9	0.6	1.4	2.5	0.4
Norway	1.2	0.6	0.9	2.4	1.9	0.5
Spain	0.6	0.5	0.4	1.0	1.5	0.2
Sweden	1.6	0.9	0.9	3.8	2.2	0.6
Switzerland	0.8	0.7	0.6	1.5	1.5	0.3
U.K.	1.1	1.1	0.8	1.3	2.6	0.6
Total Europe	1.0	0.9	0.7	1.7	2.0	0.5
U.S.	2.5	2.4	1.3	4.7	3.7	1.2

NOTE: Adults are defined as those of age 15 and over; children are below age 15. The 15-24 age group is regarded as the prime advertising target for purchasers, although the age group for main sales extends from 15 to 35.

(Source: Euromonitor)

They wear the pants in the jeans world

Five manufacturers lead the European race for market share

In the competitive world of the jeans makers, market shares are hard to establish. Most manufacturers do their own studies for internal use.

But even when they become available, they are difficult to compare because individual definitions of the product vary to sometimes include, sportswear, tops and boots.

The three U.S. giants, Levi Strauss, Wrangler and Lee, are at the top of the polls. Their exports, including jeans manufactured by offshoots outside the U.S., doubled to 380,000,000 pairs between 1967 and 1980. The main European challengers are Britain's Lee Cooper and Spain's Lois.

Levi Strauss

The world's No. 1 jeans maker, Levi Strauss & Co. of San Francisco, also tops the branded sales in most European countries, with a turnover in Europe of around $88,000,000.

It established its position in the 1960s, opening a warehouse and distribution center in Belgium.

The first European branch was set up in the Netherlands in 1967, and the first manufacturing plant in Belgium the following year.

From 1970 it began buying back all the brand's national distribution companies and establishing local branches, most recently in Spain in 1980.

Blue Bell/Wrangler

Based in Greensboro, N.C., Wrangler is generally reckoned to hold second place in total European sales. Although its position varies according to country, it is put in the top five in most. Wrangler first hit Europe in 1959, but after years of expansion, it ran into a period of recession, losing some of both corporate and product images.

Lee

H.D. Lee Co., Merriam, Kan., a subsidiary of Wyomissing, Pa.-based V.F. Corp., was a late comer on the European jeans scene, not arriving until the 1970s and even then without much apparent conviction.

However, its Lee brand is now firmly established in the United Kingdom and Scandinavia.

It is second only to Lois in Spain and is pushing hard in France, where turnover doubled in a year to hit $17,000,000.

Latest available figures show over-all European sales of $100,000,000.

Lois

Spain's top-selling maker of branded jeans is gaining ground both in Europe and North America with its upmarket, sophisticated products. Output began in Valencia in 1962, and the European expansion started with the opening of Lois Holland in 1968.

Lois France was created in 1975, and the company, which has been promoting itself heavily there, is now considering setting up a French manufacturing facility.

Lee Cooper

This company started making jeans back in 1946 and for a long time was brand leader in the U.K. It has lost that status, but plans to win it back. Its first venture overseas was in Holland, followed by France in 1961 and the rest of the European Economic Community, except Germany, thereafter.

Branches are planned for Spain and Germany eventually, but the immediate aim is to consolidate existing bridgeheads.

Manufacturing plants outside the U.K. are in France, Greece and Tunisia. Sales in 1981 were $167,000,000.

Coffee decline may level off

By JOHN C. MAXWELL JR.

Once again in 1981, U.S. consumption of coffee dropped—whether measured in gallons per capita (26), pounds per capita (9.5) or absolute volume. Nonetheless, statistics do show the possibility of a leveling off in this drop after some two decades. Much of this is due to the general aging of the population; as the population moves into middle age, coffee consumption goes up substantially.

Soluble coffee appears to be the main growth area. It accounted for about 16.5% of industry volume in 1981, up about a point and a half in share from 1980. Leaders in this area are General Foods with Sanka and Brim, and Procter & Gamble with High Point; both of these increased share substantially in 1981. Nestle's Taster's Choice decaffeinated also showed meaningful share movement. We think this will continue to be the most interesting coffee industry area for the foreseeable future.

The other real winner in the industry is General Foods' Master Blend, which showed a 5% market share in 1981 and is currently running above that. General Foods increased share in both regular and instant coffee in 1981 to the detriment of almost everyone else, with the exception of Procter & Gamble in the instant area.

The coffee industry is working on a campaign to get more people to drink coffee from mugs, as they hold more coffee than regular cups. This is an interesting market ploy and should add to the growth of the industry if successful.#

Mr. Maxwell is with Lehman Bros. Kuhn Loeb, New York.

Coffee market shares

	Regular coffee	Per cent of market		
	1978	1979	1980	1981
General Foods				
Maxwell House*	22.1%	22.3%	22.3%	20.2%
Sanka	2.0	2.1	3.2	3.5
Yuban	2.0	2.0	2.0	1.5
Max-Pax & Brim	3.5	3.5	3.5	3.0
Mellow Roast	1.8	1.6	1.0	0.8
Master Blend	—	—	—	5.0
Total	31.4	31.5	32.0	34.0
Procter & Gamble				
Folgers	26.5	27.3	25.0	24.0
Hills Brothers				
Hills Brothers	6.9	6.6	6.3	6.0
Coca-Cola				
Maryland Club	1.4	1.2	1.0	1.0
Butternut	2.7	2.5	2.4	2.4
Total	4.1	3.7	3.4	3.4
Subtotal	68.9	69.1	66.7	67.4
All others	31.1	30.9	33.3	32.6
Grand Total	100.0%	100.0%	100.0%	100.0%
	Instant coffee	Per cent of market		
	1978	1979	1980	1981
General Foods				
Maxwell House	24.0%	23.4%	22.2%	22.3%
Maxim	4.0	3.7	3.6	3.5
Sanka	10.0	9.8	10.8	11.1
Yuban	1.3	1.3	1.3	1.3
Freeze Dried Sanka	2.5	2.5	2.5	2.5
Brim #	3.0	2.8	3.6	4.0
Mellow Roast	3.5	4.0	2.0	1.8
Total	48.3	47.5	46.0	46.5
Procter & Gamble				
Folgers	8.0	8.5	11.0	11.0
High Point	—	—	2.5	5.5
Total	8.0	8.5	13.5	16.5
Hills Brothers				
Hills Brothers	0.3	0.2	0.2	0.2
Nestle				
Nescafe Regular	8.7	8.2	7.8	7.5
Nescafe Decaffeinated	2.5	2.8	2.5	2.3
Taster's Choice 100% Coffee	12.5	12.7	11.7	9.5
Decaf	1.0	1.0	1.0	1.0
Taster's Choice Decaffeinated	5.1	4.8	4.3	6.0
Sunrise	3.0	4.0	2.3	1.5
Total	32.8	33.5	29.6	27.8
Borden				
Kava	1.0	1.0	1.0	1.0
Subtotal	90.4	90.7	90.3	92.0
All others	9.6	9.3	9.7	8.0
Grand Total	100.0%	100.0%	100.0%	100.0%

* Electra-Perk is roughly 6% in all years.
\# Brim and International after 1974.
Source: Lehman Brothers Kuhn Loeb Research.

U.S. per capita coffee totals

	Population*	Pounds	1957=100	Gallons	1957=100
1975	215.5	12.2	77.7	33.0	82.5
1976	217.6	12.5	79.6	29.4	73.5
1977	219.8	9.4	59.9	28.0	70.0
1978	222.1	10.5	66.9	27.0	67.5
1979	224.6	11.3	72.0	27.7	69.3
1980	227.2	10.4	66.2	27.0	67.5
1981	229.3	9.5	60.5	26.0	65.0

* In millions, as of July 1
Sources: USDA; Bureau of Census; LBKL Research

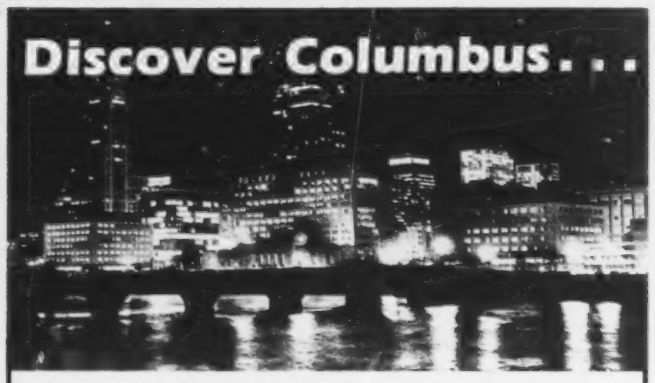
DAVID W. TIBBOTT

CHATHAM, MASS.—David W. Tibbott, 86, retired director of advertising and information services, New England Mutual Life Insurance Co., Boston, died March 4 after a long illness.

Prior to joining the company in 1939, he was in the national ad department, *Boston Globe*; covered the New England states and eastern Canada for the ad department of the *Saturday Evening Post*, and was an account exec in BBDO's Boston office.

EDITH H. BOSWORTH

BRISTOL, R.I.—Edith H. Bosworth, 85, retired treasurer of the Phoenix-Times Publishing Co., died here March 4. She was the wife of Roswell S. Bosworth Sr., retired publisher of the *Bristol Phoenix*. Survivors also include a son, Roswell Jr., who is now publisher of the Phoenix-Times Newspapers.#



an area of growth, innovation and progress

While most areas in the Northeast quadrant of the United States are losing population to the Sun Belt, Columbus, Ohio is growing.* What's more, Columbus' fortunes do not rise and fall with a single particular industry. Our steady, healthy economy reflects a balanced blend of commerce and industry, education, research and agribusiness.

Along with Hartford and Boston, Columbus is one of the leading insurance capitals of the United States. More than 50 insurance company home offices are located in Columbus.

Columbus is strong in many areas that may surprise you. But the real excitement is that The Columbus Dispatch and Citizen-Journal cover this energetic, developing market with 61% coverage of all adults each weekday.** Equally important, our one million plus people have spending power rivaled by no population of comparable size in America. Effective buying income is in excess of $9 billion . . . and steadily growing.

Sources: *Survey of Buying Power **Belden CMS, 1981

The Columbus Dispatch
Evening & Sunday

Columbus Citizen-Journal
Morning

Represented nationally by Cresmer, Woodward, O'Mara and Ormsbee, Inc.

Is your advertising a looking glass...or a window?

When you look at your advertising, do you see a flattering vision of yourself, or a realistic view of your markets?

That question deserves some serious thought. Because it's easy to get so wrapped up in your own products and interests that you lose sight of the customer. And that can result in some pretty ineffective advertising.

Which you don't want.

When you get right down to it, flattery is expensive at any price—but good advertising pays for itself.

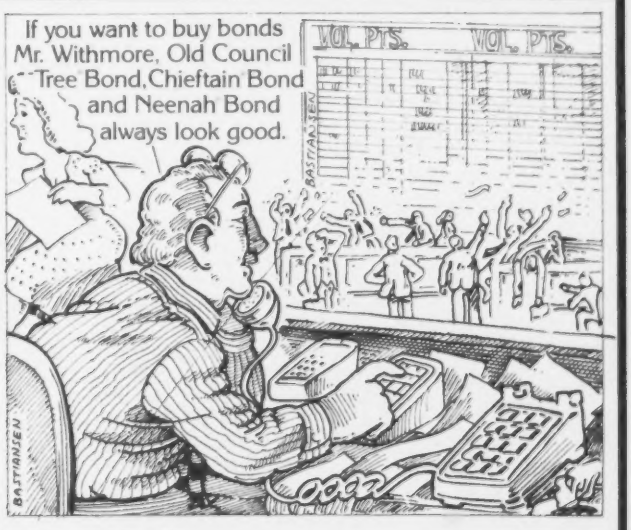
We at Davis Harrison believe that the best way to keep clients happy is by turning out advertising that gets through to the market.

Give us a call. We'll show you how Davis Harrison Advertising can take you beyond the looking glass.

Contact Doug Davis at:

Davis Harrison Advertising

333 N. Michigan Ave. Chicago, Illinois 60601 (312) 332-0808


If you want to buy bonds Mr. Withmore, Old Council Tree Bond, Chieftain Bond and Neenah Bond always look good.
VOL. PTS.
VOL. PTS.
BASTIANSEN
BASTIANSEN

Neenah Paper

Neenah Papers — a sure bet if you want to print on quality stock.

Neenah Paper
A Kimberly-Clark Company
Neenah, Wisconsin 54956

©1982 K.C.C.

Ad pages in farm publications for 3 months, 1982-1981

First quarter and year-to-date figures for U.S. and Canadian publications reporting to Advertising Age

Key: (mon)-monthly; (sm)-semi-monthly; (bm)-bi-monthly; (bw)-bi-weekly; (w)-weekly; (d)-daily; (q)-quarterly

	Pages Jan.-March 1982	Pages Jan.-March 1981
General Farm Publications		
American Agriculturist	130.7	131.4
Measured in lines	99,277	99,955
◊Big Farmer	37.2	56.6
Measured in lines	15,940	24,274
§†California Farmer (sm)	282.2	281.5
Measured in lines	214,532	213,993
Cotton Farming	118.0	96.9
Measured in lines	49,560	40,698
§Farm Futures	85.7	116.5
Measured in lines	36,752	49,978
Farm Industry News	190.6	164.2
Measured in lines	144,858	124,822
Farm Journal	363.3	348.5
Measured in lines	152,581	149,445
Farm Money Management	35.0	32.9
Measured in lines	14,700	13,818
Farmer-Stockman Unit: (mon)		
Oklahoma Farmer-Stockman	62.2	48.2
Measured in lines	47,287	36,692
Texas Farmer-Stockman	51.0	51.1
Measured in lines	38,766	38,885
Harvest Publishing Unit: (sm)		
Florida Grower & Rancher	54.1	49.4
Measured in lines	41,085	37,508
Kansas Farmer	268.8	308.4
Measured in lines	204,300	234,385
Michigan Farmer	299.8	288.2
Measured in lines	227,859	219,067
Missouri Ruralist	358.5	357.1
Measured in lines	272,448	271,367
Ohio Farmer	440.1	418.0
Measured in lines	334,469	317,686
Pennsylvania Farmer	287.5	271.6
Measured in lines	218,519	206,389
High Plains Journal: (w)		
Eastern Kansas	644.1	621.3
Measured in lines	521,406	695,898
Colorado	646.7	635.7
Measured in lines	724,248	711,984
Nebraska	622.9	621.2
Measured in lines	697,696	695,716
Oklahoma-Texas	650.3	640.7
Measured in lines	728,294	717,542
Western Kansas	701.1	681.9
Measured in lines	785,246	763,756
§Irrigation Age	101.9	125.3
Measured in lines	43,733	53,772
Kentucky Farmer (mon)	177.7	136.8
Measured in lines	135,058	103,997
Lancaster Farming (w)	1,237.1	1,488.3
Measured in lines	1,939,773	2,000,302
Midwest Unit Farm Publications: (sm)		
The Farmer	524.0	526.0
Measured in lines	398,306	399,907
Nebraska Farmer	536.8	573.3
Measured in lines	407,942	435,694
§Prairie Farmer:		
#Illinois Edition	566.9	595.2
Measured in lines	430,874	452,343
#Indiana Edition	542.2	540.2
Measured in lines	412,068	410,556
Average 2 Editions	554.5	567.7
Measured in lines	421,436	431,453
§Wallaces Farmer	531.7	537.2
Measured in lines	404,108	408,237
Wisconsin Agriculturist	375.7	384.2
Measured in lines	285,539	292,022
▲Pecan South	32.9	29.2
Measured in lines	13,818	12,264
§Progressive Farmer	285.2	271.4
Measured in lines	119,776	113,969
Specialized Agricultural Publications:		
Flue Cured Tobacco Farmer	100.1	73.9
Measured in lines	42,628	31,485
Peanut Farmer	62.1	48.9
Measured in lines	26,447	20,823
§Successful Farming (mon)	339.9	354.4
Measured in lines	145,807	152,034
Tennessee Farmer (mon)	66.0	62.3
Measured in lines	50,123	47,312
Western Unit Farm Magazines: (mon)		
Arizona Farmer-Ranchman	130.0	134.1
Measured in lines	98,810	101,921
Colorado Rancher & Farmer	159.5	154.6
Measured in lines	121,202	117,520
Northwest Unit Farm Magazines:		
Idaho Farmer-Stockman	260.5	292.6
Measured in lines	197,992	222,384
Montana Farmer-Stockman	343.7	381.0
Measured in lines	261,208	289,558
Oregon Farmer-Stockman	202.7	232.0
Measured in lines	154,045	176,333
Utah Farmer-Stockman	183.4	216.4
Measured in lines	139,409	164,127
Washington Farmer-Stockman	223.0	241.0
Measured in lines	169,495	183,180
Wyoming Stockman-Farmer	88.9	115.2
Measured in lines	67,531	87,520
Total Group	13,929.2	14,302.5
Dairy & Livestock		
§Beef Magazine	181.6	162.9
The Cattleman (mon)	377.4	326.2
Dairy: (mon)		
Full Edition	75.8	63.7
Western Edition	111.9	126.9
Dairy Herd Management	134.9	158.7
§Drovers Journal	244.7	289.6
Farm Progress Hog Producers	26.6	37.8
Feedlot Management	75.1	93.4
Florida Cattleman (mon)	220.2	204.4
§Hoards Dairyman (sm)	303.2	310.3
Hog Farm Management	138.2	172.4
†Livestock Breeder Journal	232.8	254.7
National Hog Farmer	273.9	231.9
Pig American	65.0	99.6
Western Livestock Journal/Monthly		
Central Edition	104.2	123.0
Western Edition	124.0	117.2
Southern Edition	70.7	79.4
Western Livestock Journal Weekly		
Central Edition	118.8	147.8
Western Edition	140.3	176.1
Western Livestock Reporter/-Montwyo News (w)	446.0	270.7
Total Group	3,465.7	3,416.7
Fruit & Vegetable		
American Fruit Grower	147.3	152.5
American Vegetable Grower (mon)	139.9	146.2
Citrograph	148.1	114.7
Total Group	435.3	413.4
Poultry		
Broiler Industry	146.7	160.9
Poultry & Egg Mktg.	62.0	66.0
Poultry Digest	75.9	105.6
Poultry Times		
Southeast Edition	156.3	158.7
Southwest Edition	101.6	102.1
Northeast/Midwest Edition	77.6	79.2
Pacific Edition	73.1	68.6
Poultry Tribune	89.8	122.9
Total Group	783.0	864.0
Canadian		
Country Guide: (mon)		
#Eastern Edition	174.7	165.8
#National Edition	328.2	286.7
#Western Edition	214.4	196.7
Average 3 Editions	239.1	216.4
Le Bulletin des Agriculteurs (mon)	279.0	258.0
Total Group	518.1	474.4

§Sectional linage included but prorated to circulation of regional editions. †Published twice a month except June, July and Dec. monthly. ▲Published six times a year. ◊Published 11 times a year. #Not included in totals. ○Published ten times a year.

ABC soaps clean up on ratings sheets

'Capitol' scores with novel promo

By JAMES P. FORKAN

NEW YORK—ABC-TV continued to clean up in the world of daytime soap operas, in both homes and women 18 to 49, through the first quarter, but its rivals this month are working up a lather in scheduling and tune-in promotion.

On the advertiser side, Procter & Gamble still is having mixed results with its tv soaps, although daytime's biggest spender does produce three of the opening quarter's 10 most popular series.

The big daytime favorite still is ABC's "General Hospital," based on weekly and quarterly numbers through March 19. Coming closest to "GH's" 11.4 homes rating in the quarterly Nielsens were ABC's "All My Children" (at 9.7) and "One Life to Live" (9.4).

CBS' top show in the first quarter was P&G's "Guiding Light," at 8.7, followed by "The Price Is Right" with an 8.5 homes average. "As the World Turns," another P&G perennial, was sixth with an 8.1 score, slightly ahead of the other CBS serial hit, "The Young & the Restless," at 7.9.

P&G's "Search for Tomorrow" averaged a 7.4 for January through March to rank eighth, edging NBC's "Family Feud" and ABC's "Ryan's Hope," tied at No. 9 with 7.2 scores.

While P&G and fellow soap giant Colgate-Palmolive are not involved in an owner/producer capacity with the three hottest ABC soaps, Colgate is a participating sponsor in "GH," and P&G has spots running in the other two and in CBS' "Young," for example.

In the Nielsens for the week ended March 19, ABC's "All My Children" was closest to leader "GH" (9.0 to 10.1), with "One Life" right behind at 8.3.

"The Price Is Right" was CBS' top daytime show with an 8 rating for its 11:30 a.m. (ET) instalment. P&G's "Guiding Light" followed as CBS' favorite serial, while "Young & Restless" tied "As the World Turns" at No. 6 with a 7.2 homes average.

Rounding out the top 10 for that week were the opening half-hour of "The Price Is Right," ABC's "Ryan's Hope" and "Search for Tomorrow" near the end of its CBS run.

ABC execs also pointed to the daytime roster's sex appeal among the all-important women 18 to 49. The latest demographic data, covering January and February, showed "General Hospital" as the favorite with an average 5,790,000 women per show in that age bracket, out of a total viewership of 13,070,000. ABC also had the three other demographic biggies—"All My Children" with 5,230,000 women 18 to 49 out of 10,750,000 viewers; "One Life to Live" (5,000,000 women 18 to 49) and "Ryan's Hope" (3,200,000).

Their closest rivals for the women's affections were CBS' "Guiding Light" and "Young & Restless," tied for fifth with slightly more than 3,000,000 women 18 to 49 per episode. "Guiding Light" had 3,120,000 fewer total viewers than "GH" in the same 3 p.m. to 4 p.m. time period.

The highest-rated daytimer ever, "General Hospital," has slipped some since last season. It averaged a 12.1 rating with 14,000,000 fans in the span from June 29 through Sept. 18 (AA, Oct. 5). Some industry sources attributed the slippage to the departure of Genie Francis (Laura) from the serial shortly after her tv wedding to Tony Geary (Luke), who now has a new love interest. It was noted that the series' writing staff moved to NBC's "Days of Our Lives" (AA, Oct. 5).

■ "General Hospital" also leads among teens, 1,800,000 compared with the 620,000 drawn to "Guiding Light." The latter serial, apparently in an effort to rectify that, has begun using pop singers in the stories. Among those signed have been Judy Collins and the Bee-Gees' Maurice Gibb; this latest wrinkle in the celebrity guest trend will continue into June.

CBS is banking heavily on "Capitol's" success as it tries to break ABC's lock on daytime leadership. As James Rosenfield, CBS/Broadcast Group president, told an analysts group recently, "If we can achieve a one-point improvement in ratings over a year in daytime, we could increase our revenue for the year by $47,500,000."

CBS' strategy of slotting a preview "Capitol" special in prime time behind "Dallas" proved shrewd, delivering an 18 rating and 30 share to rank No. 29 among prime timers during the week ended March 22. ABC for its part benefited too: With "Capitol" losing 10 rating points from its "Dallas" lead-in, ABC's "Strike Force" got a 17.4 rating, its best showing of the season to that point.

(Continued on Page 86)

Serials win prime time points

NEW YORK—"Dallas," which helped the soap opera format bubble over into prime time, remains the overwhelming favorite of its genre.

That serial on the machinations of the J.R. Ewing clan, tv's top-rated series of any kind in the 46 audience share range, also is assisting "Falcon Crest," with a 37 share due mainly to the "Dallas" lead-in.

To further fuel the ratings, CBS ran a "Dallas" tune-in ad in *TV Guide* for the April 9 episode, saying, "Tonight! Each person's life will change...One will crumble. Which one?"

"Dynasty," in the top 25 for the season thus far with a 34 Nielsen share, is ABC's top prime time trials-and-tribulations drama. This serial posted its strongest numbers (23.7 rating and 42 share) in the week ended March 28, topping its previous high a week earlier.

"Knots Landing," the "Dallas" spinoff, is barely among the top 40 series for the season to date with a 28 share. Late last month, "Knots" tried to call up its J.R. connection once again with tune-in ads, but that episode lost the time period to both "Nurse" and "20/20."

■ NBC's "Flamingo Road" has not yet caught soap fever. The fact that it has scarcely cracked the top 70 prime time shows, thanks to a meager 24 share, puts it in jeopardy as renewal time nears.

The steamy drama format also has boiled over into syndication this year. Among the soapy series offered at the recent National Assn. of Television Program Executives international convention in Las Vegas were six focusing on serial story lines or stars: PolyGram's "Daytime World of Soaps," Firestone Syndication's "Soap Opera Digest," Andrews/Mitchell's "Soap Opera Recap," Mag/Net Inc.'s "Soap Talk" and Colbert/King World Productions' "Soap World" series and "The Soap Spot," a package of interview briefs. Series in soap format, meanwhile, included Comworld International's "Romance Theatre" dramas, Columbia Pictures TV's offnet reruns of the "Soap" prime timer and Worldvision Enterprises' "Dark Shadows" oldie.